eHEF User Manual

Introduction

eHEF has been designed to support the Health Equality Framework. It is a Microsoft Excel-based tool that has been designed to be portable and run on most systems. eHEF runs on Excel versions 2003 and above and Excel for MAC.

System Requirements

- Hardware: PC or MAC
- Software: Microsoft Excel 2003 or later
- Screen Resolution: 1280 pixels wide or higher

How to obtain your copy of eHEF:

Download eHEF from: www.ndti.org.uk/publications/other-publications/the-health-equality-framework-and-commissioning-guide1/

Security

You must be aware of your organisation's data security, data protection and other relevant policies that might relate to your use of eHEF. In particular, you should be aware that it is not advisable to email eHEF to anyone without due consideration for the security of the data contained within it.

Note: you should remember to SAVE eHEF after adding or editing any data. Depending on you Excel version/settings it may AutoSave. You are advised to check this or just SAVE as you go to be sure.

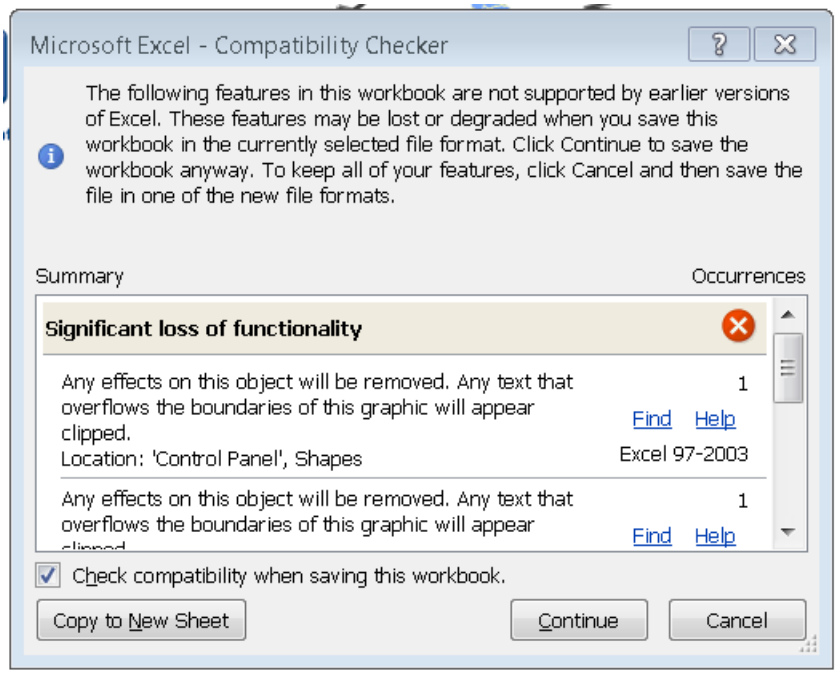
Storage/Saving eHEF

Single User: If you are working alone then you should simply store eHEF in a convenient location on your computer. The default file name is just eHEF.xls. You are free to change this if you wish but it is recommended you keep the first part of the filename intact. So, you may choose to name yours eHEF – Jane.xls (if you are called Jane)

Multi User: If you work within a team where others are also running eHEF then it is recommended you store all copies on the same shared network location. This is to facilitate data aggregation which is managed by eHEF Manager, a separate tool. eHEF Manager has its own user manual. In this scenario it will be essential that file names are unique and that you can easily identify your copy of eHEF in the shared folder. A suggested convention might be the use of your first and last initials with the date of your birthday. Example, if your name is Simon Hughes and your birthday is on 5th September, you would call your file eHEF – SH0509.xls. It is essential that you keep the first part of the file name intact for eHEF Manager to be able to identify it and capture data from it for analysis.

Compatibility Warning: Because eHEF is designed to run on most versions of Excel you will sometimes (depending on your version) get a compatibility warning when saving. You can simply

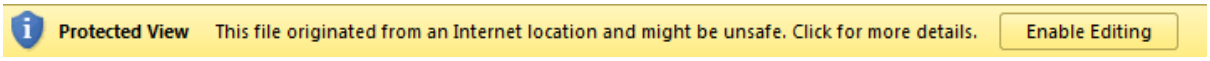
click ‘Continue’ and you may wish to clear the ‘Check Compatibility’ box for this file so you shouldn’t be bothered by the warning again. None of eHEF’s features will be compromised by keeping the file in its original format/version.


Microsoft Excel - Compatibility Checker
The following features in this workbook are not supported by earlier versions of Excel. These features may be lost or degraded when you save this workbook in the currently selected file format. Click Continue to save the workbook anyway. To keep all of your features, click Cancel and then save the file in one of the new file formats.
Summary
Occurrences
Significant loss of functionality
Any effects on this object will be removed. Any text that overflows the boundaries of this graphic will appear clipped.
Location: 'Control Panel', Shapes
1
Find
Help
Excel 97-2003
Any effects on this object will be removed. Any text that overflows the boundaries of this graphic will appear
1
Find
Help
Check compatibility when saving this workbook.
Copy to New Sheet
Continue
Cancel

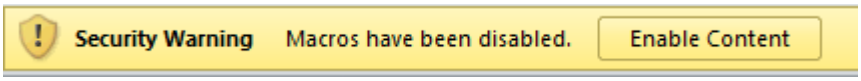
Opening eHEF:

Once you have received your copy of eHEF and stored it with an appropriate name you will want to go ahead and start using it! Open eHEF as you’d open any other file (usually a double-click).

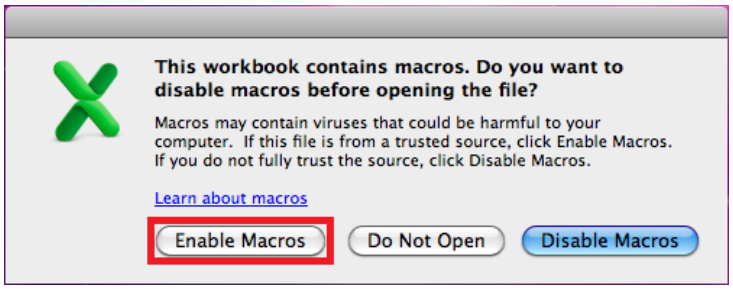
You *may* receive a message prompting you to ‘Enable Editing’ to which you should agree.


Protected View
This file originated from an Internet location and might be unsafe. Click for more details.
Enable Editing

Next you’ll need to ‘Enable Macros’. The prompt for this action looks different according to your version of Excel and your security settings. Here is the Excel 2010 version of the prompt.



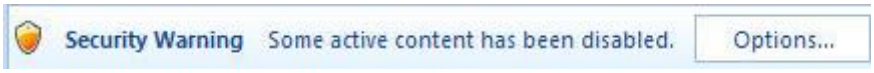
If you are using a mac version of Excel, you will see this prompt and simply click ‘Enable Macros’.


This workbook contains macros. Do you want to disable macros before opening the file?
Macros may contain viruses that could be harmful to your computer. If this file is from a trusted source, click Enable Macros. If you do not fully trust the source, click Disable Macros.
Learn about macros
Enable Macros
Do Not Open
Disable Macros

If you are using Excel 2003, you will see this prompt and need to click ‘Enable Macros’.

Security Warning
"D:\Documents\A.Net\ExcelMeetManager\NewEMM\Cross-Country\35.xls" contains macros.
Macros may contain viruses. It is usually safe to disable macros, but if the macros are legitimate, you might lose some functionality.
Disable Macros
Enable Macros
More Info

If you have a copy of Excel 2007, you will see this message and you will need to click 'Options…' then 'Enable This Content' and then click OK.



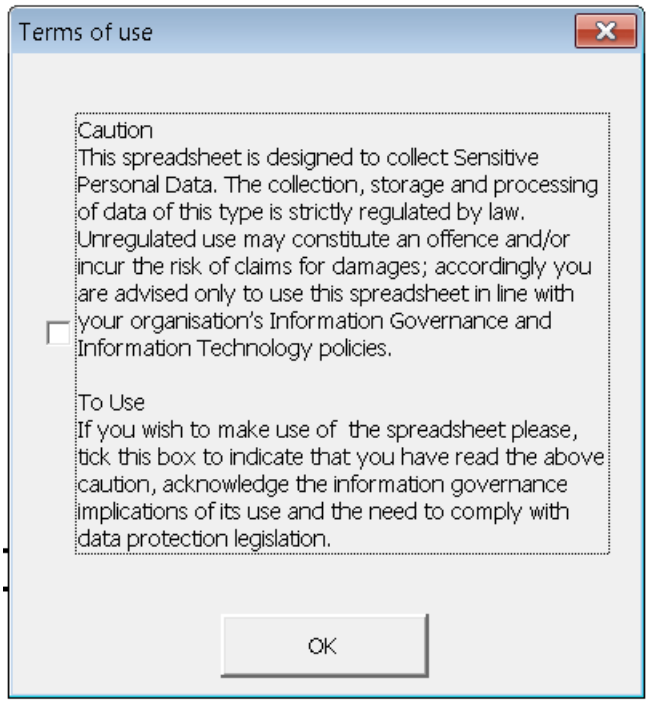
Microsoft Office Security Options
Security Alert - Macros & ActiveX
Macros & ActiveX
Macros and one or more ActiveX controls have been disabled. This active content might contain viruses or other security hazards. Do not enable this content unless you trust the source of this file.
Warning: It is not possible to determine that this content came from a trustworthy source. You should leave this content disabled unless the content provides critical functionality and you trust its source.
More information
File Path: D:\Documents\A.Net\ExcelMeetManager\NewEMM\Cross-Country\30.xls
Help protect me from unknown content (recommended)
Enable this content
Open the Trust Center
OK
Cancel

If you see this message instead, click 'Enable Macros'

Microsoft Office Excel Security Notice
Microsoft Office has identified a potential security concern.
Warning: It is not possible to determine that this content came from a trustworthy source. You should leave this content disabled unless the content provides critical functionality and you trust its source.
File Path: D:\...ts\A.Net\ExcelMeetManager\NewEMM\Cross-Country\27.xls
Macros have been disabled. Macros might contain viruses or other security hazards. Do not enable this content unless you trust the source of this file.
More information
Enable Macros
Disable Macros

Terms of Use

Each time you open eHEF AAT you will be required to agree with its Terms of Use by ticking the box and clicking 'ok' as shown below.


Terms of use
Caution
This spreadsheet is designed to collect Sensitive Personal Data. The collection, storage and processing of data of this type is strictly regulated by law. Unregulated use may constitute an offence and/or incur the risk of claims for damages; accordingly you are advised only to use this spreadsheet in line with your organisation's Information Governance and Information Technology policies.
To Use
If you wish to make use of the spreadsheet please, tick this box to indicate that you have read the above caution, acknowledge the information governance implications of its use and the need to comply with data protection legislation.
OK

Creating a Log In:

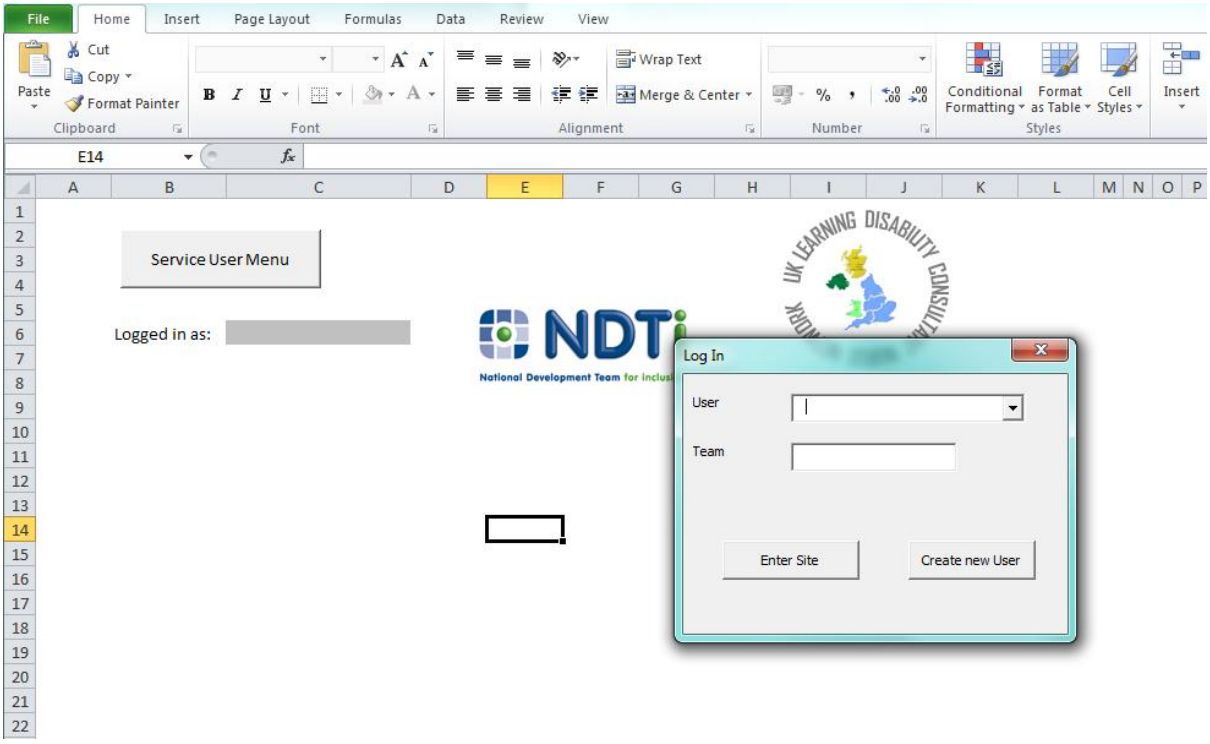
First time you use eHEF you will need to create your username. To do this:

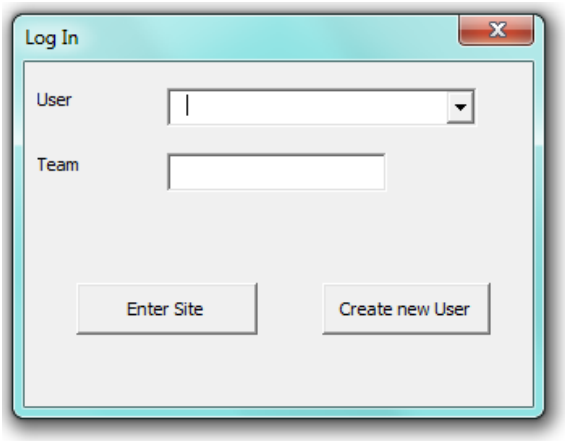
1) Click 'Create new User'

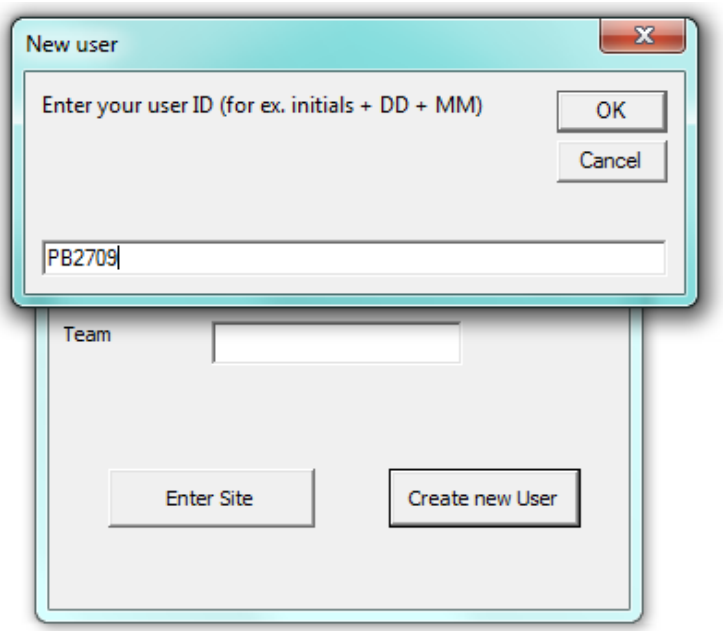
2) Enter your chosen user ID. It is recommended you follow the convention (mentioned in the Storage section above) of using your first and last initials with the date of your birthday. For example, if your name is Peter Brown and your birthday is on 27th of September, your username would be PB2709.

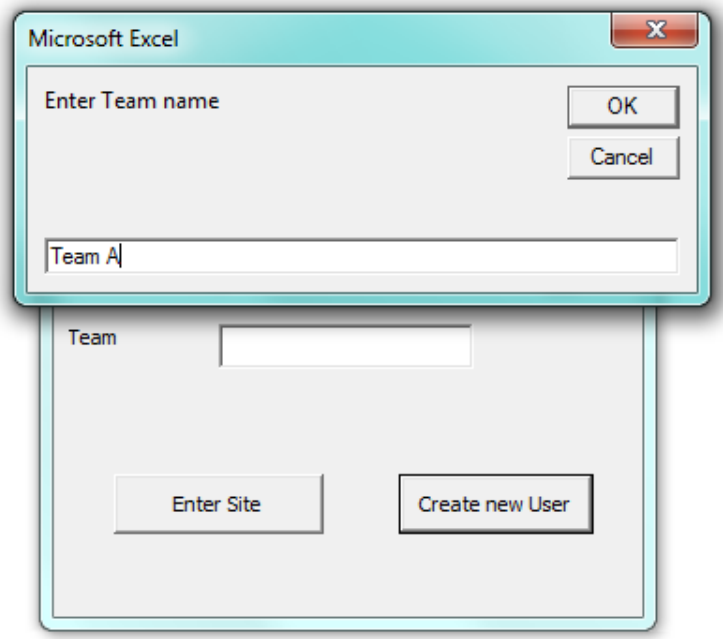
3) Click 'Ok'

4) Next you are prompted for your Team Name. If you are a single user you can leave this blank. In a multi user environment please consult with colleagues to agree a suitable (short) team name. This will be important for the eHEF Manager tool which has the ability to group data by team name.



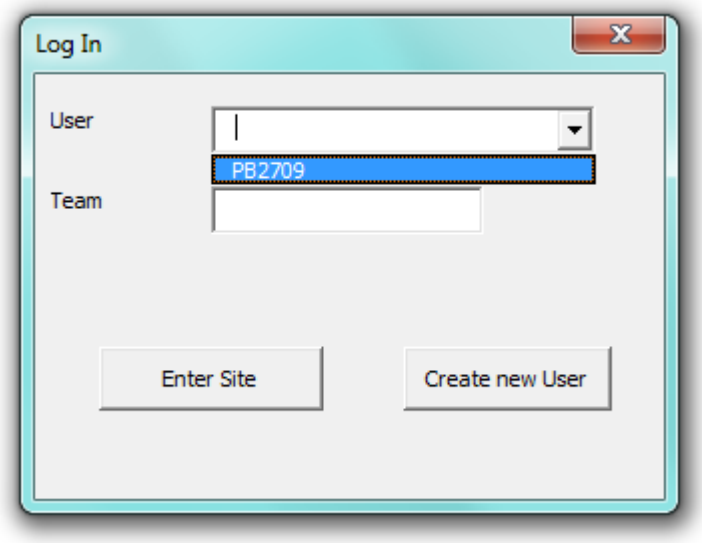


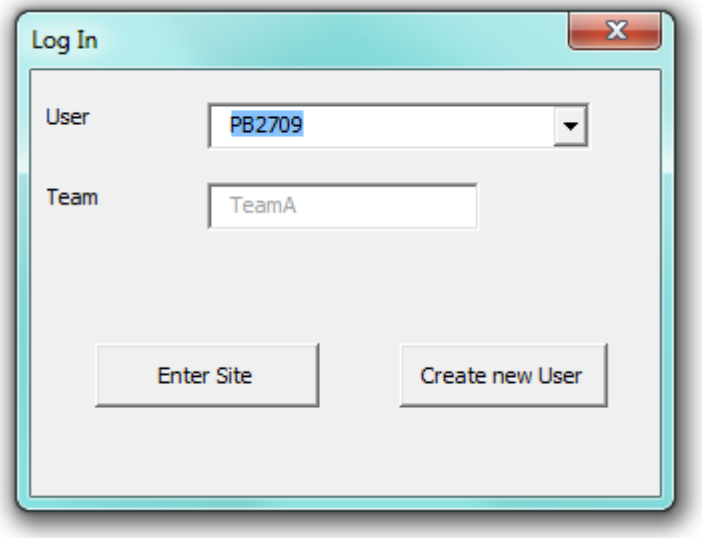

New user
Enter your user ID (for ex. initials + DD + MM)
OK
Cancel
PB2709
Team
Enter Site
Create new User


Microsoft Excel
Enter Team name
OK
Cancel
Team A
Team
Enter Site
Create new User

Logging in with as an existing username:

Once you've created your username in eHEF you can log in simply by selecting the appropriate name from the drop-down list. Usually there'll only be one name here but in some scenarios users may wish to share a copy of eHEF with colleagues.

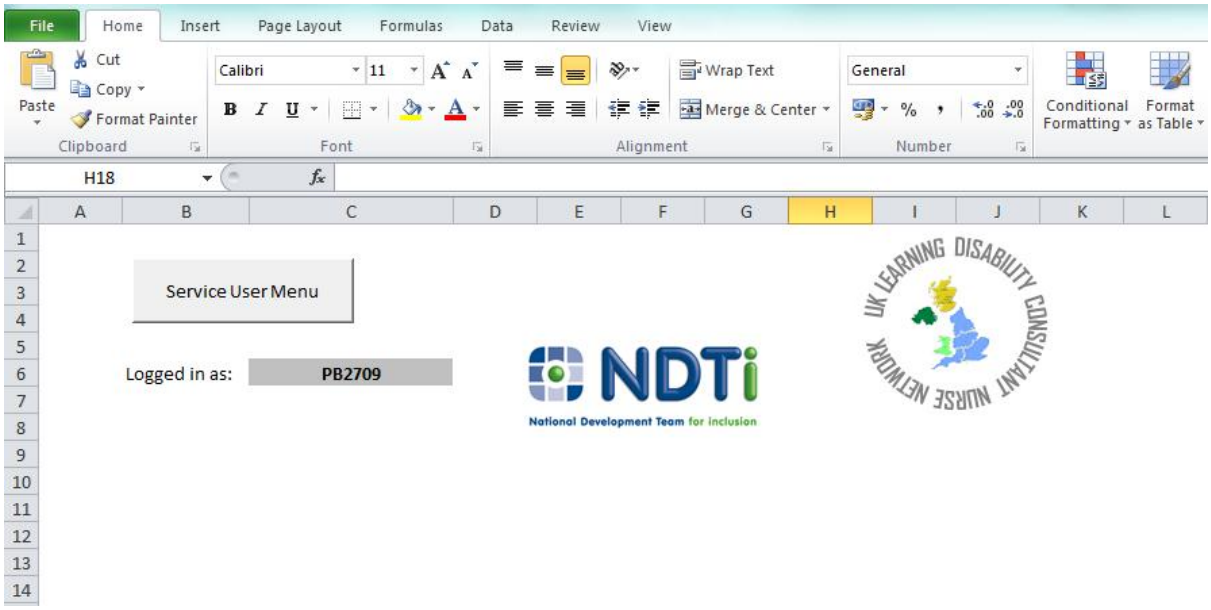




Note about activity logging:

eHEF has a simple logging feature that keeps track of any significant activity. The following actions are logged:

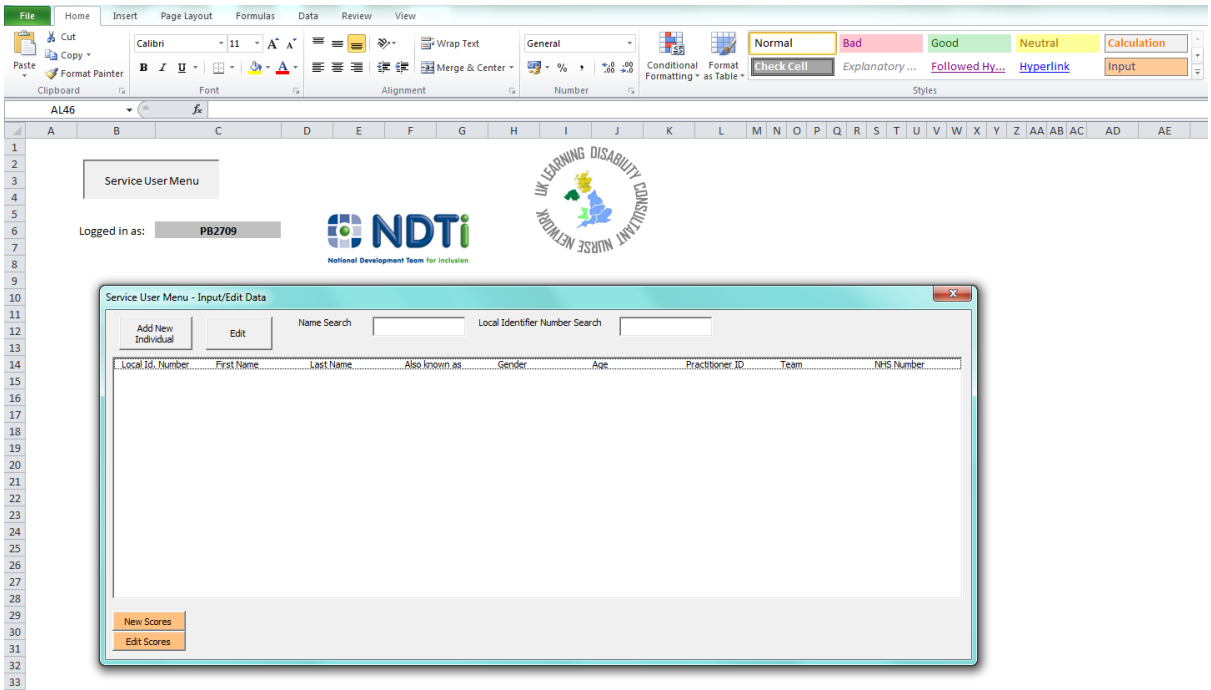
1) New individual added
2) Individual's details edited
3) New HEF score added
4) HEF score edited



Adding a new individual:

To add a new individual to eHEF follow these steps.

1) Click the 'Input/Edit Data' button on the home screen.
2) Click 'Add New Individual'
3) Complete the individual's details
4) Click 'Save' and then confirm submission. You'll receive a prompt that the record has been saved

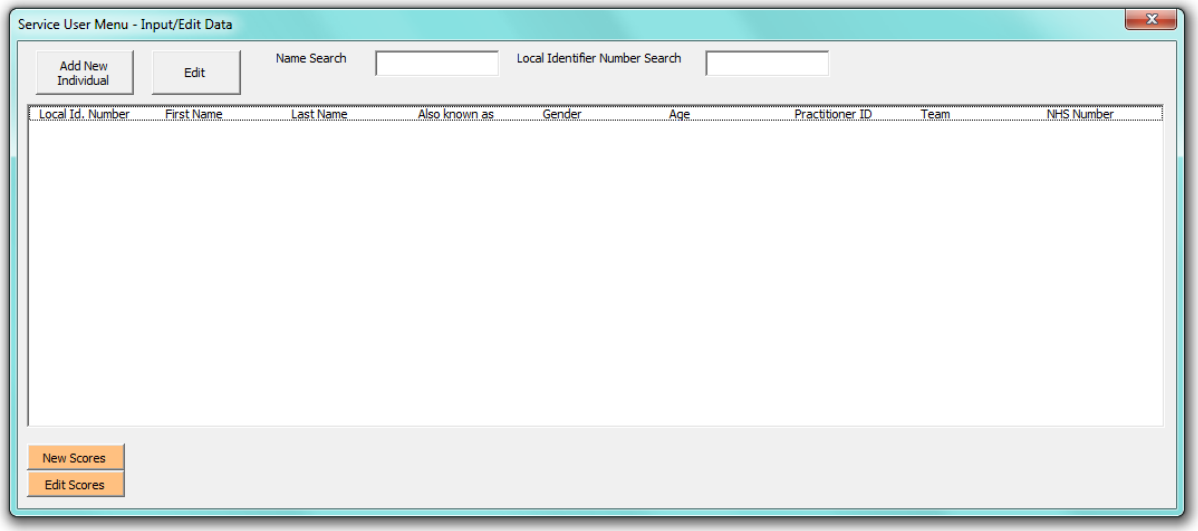


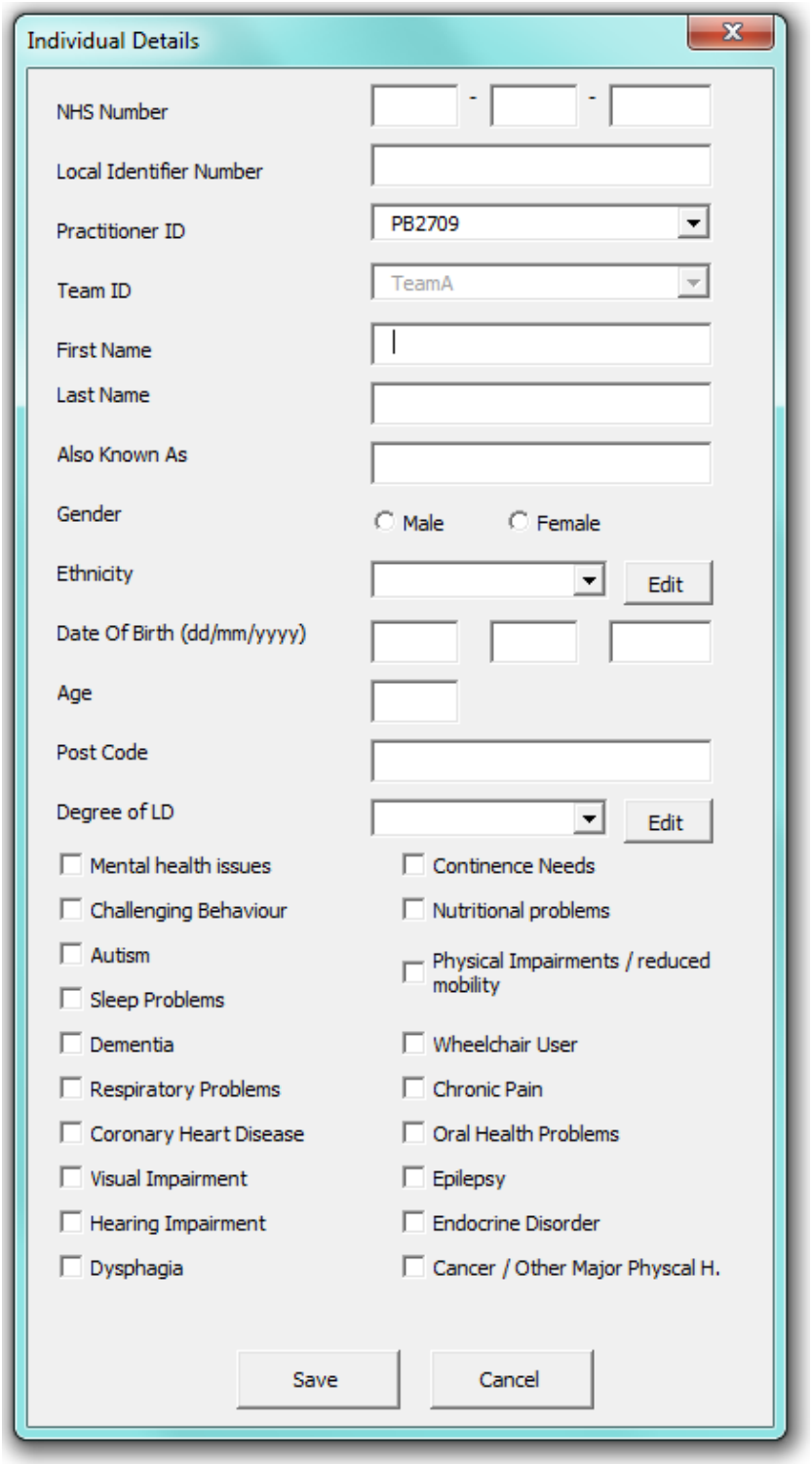
Practitioner ID & Team ID	Ethnicity
First Name	Date of Birth & Age
Last Name	Post Code
Gender	Degree of LD

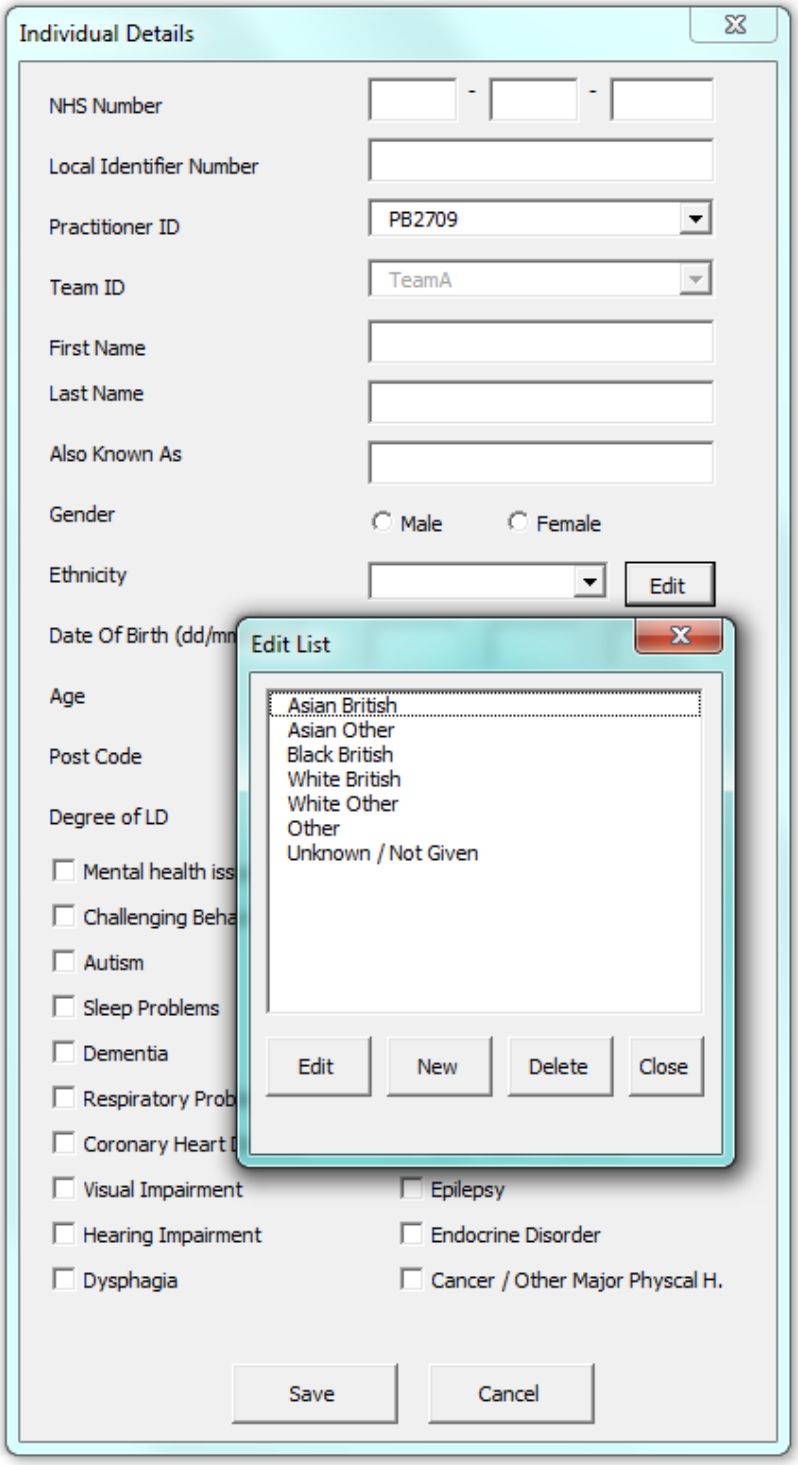
Tick boxes: The tick-boxes in the lower half of the form (mental health issues, challenging behaviour etc) will record a 'no' value if not ticked so although they're not required fields they do generate a value if not left un-checked.

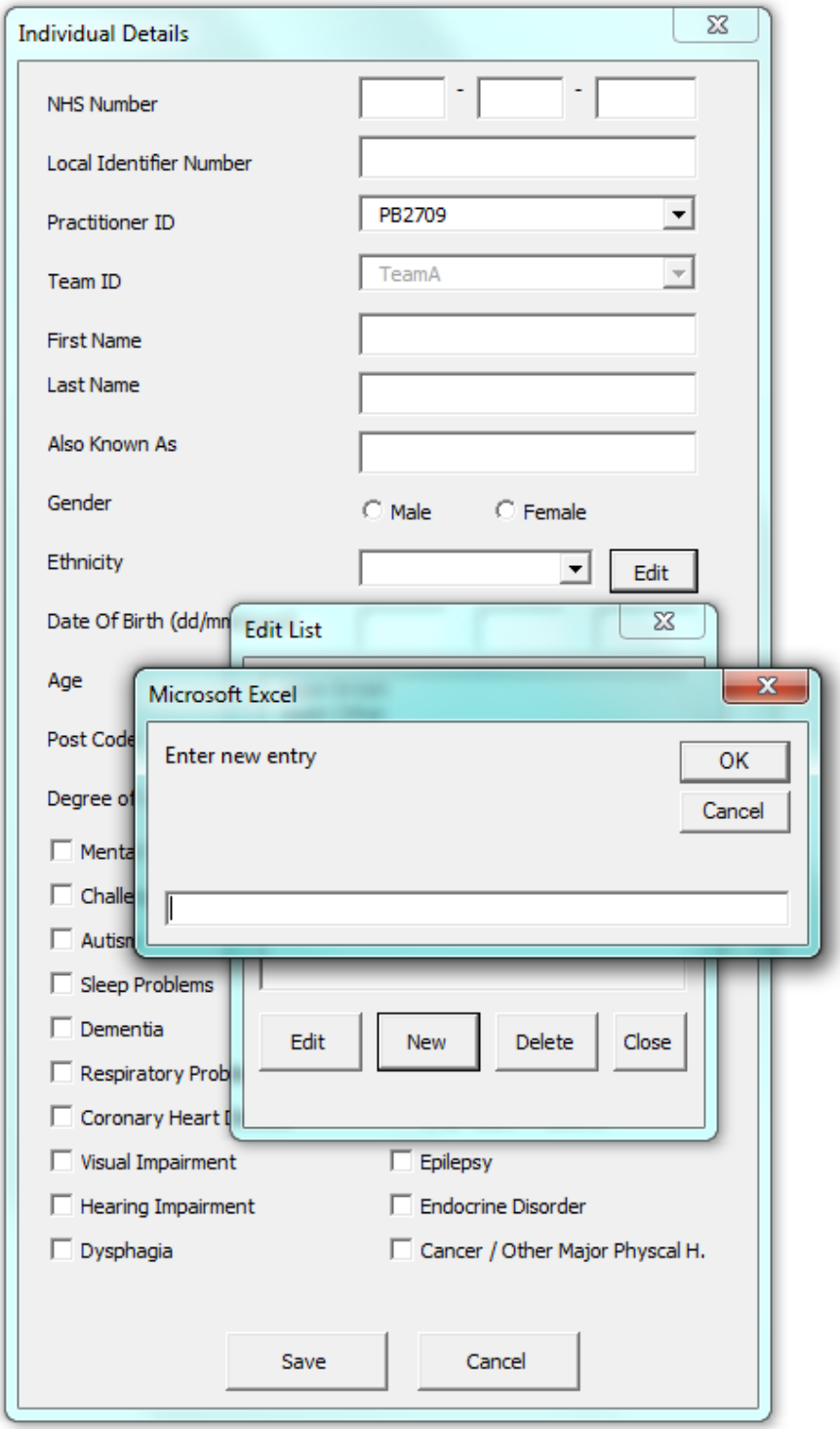
Local Identifier: The Local Identifier field (not a required field) is available for you to capture a reference number, or similar, that you would use within your organisation.

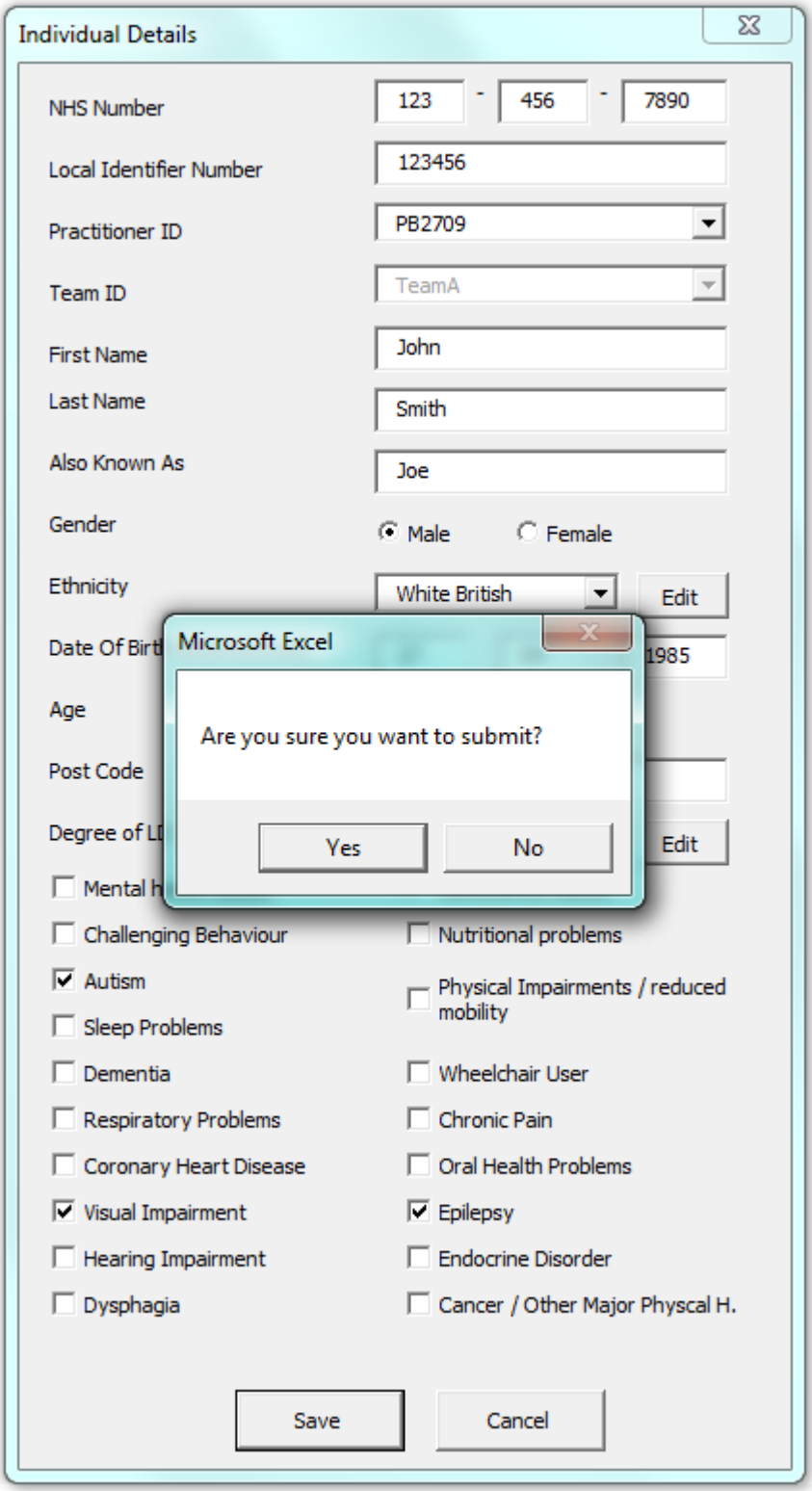
Edit drop down boxes: You can edit the options of the drop down boxes for ethnicity and degree of LD. To do this, press the Edit option next to the drop down menu to edit an existing ethnicity, add a new ethnicity, delete an ethnicity and then close once you have made the appropriate changes.




Individual Details
NHS Number
Local Identifier Number
Practitioner ID
PB2709
Team ID
TeamA
First Name
Last Name
Also Known As
Gender
Male
Female
Ethnicity
Edit
Date Of Birth (dd/mm/yyyy)
Age
Post Code
Degree of LD
Edit
Mental health issues
Challenging Behaviour
Autism
Sleep Problems
Dementia
Respiratory Problems
Coronary Heart Disease
Visual Impairment
Hearing Impairment
Dysphagia
Continence Needs
Nutritional problems
Physical Impairments / reduced mobility
Wheelchair User
Chronic Pain
Oral Health Problems
Epilepsy
Endocrine Disorder
Cancer / Other Major Physcal H.
Save
Cancel


Individual Details
NHS Number
Local Identifier Number
Practitioner ID
PB2709
Team ID
TeamA
First Name
Last Name
Also Known As
Gender
Male
Female
Ethnicity
Edit
Date Of Birth (dd/mm
Age
Post Code
Degree of LD
Mental health iss
Challenging Beha
Autism
Sleep Problems
Dementia
Respiratory Prob
Coronary Heart D
Visual Impairment
Hearing Impairment
Dysphagia
Epilepsy
Endocrine Disorder
Cancer / Other Major Physcal H.
Save
Cancel
Edit List
Asian British
Asian Other
Black British
White British
White Other
Other
Unknown / Not Given
Edit
New
Delete
Close

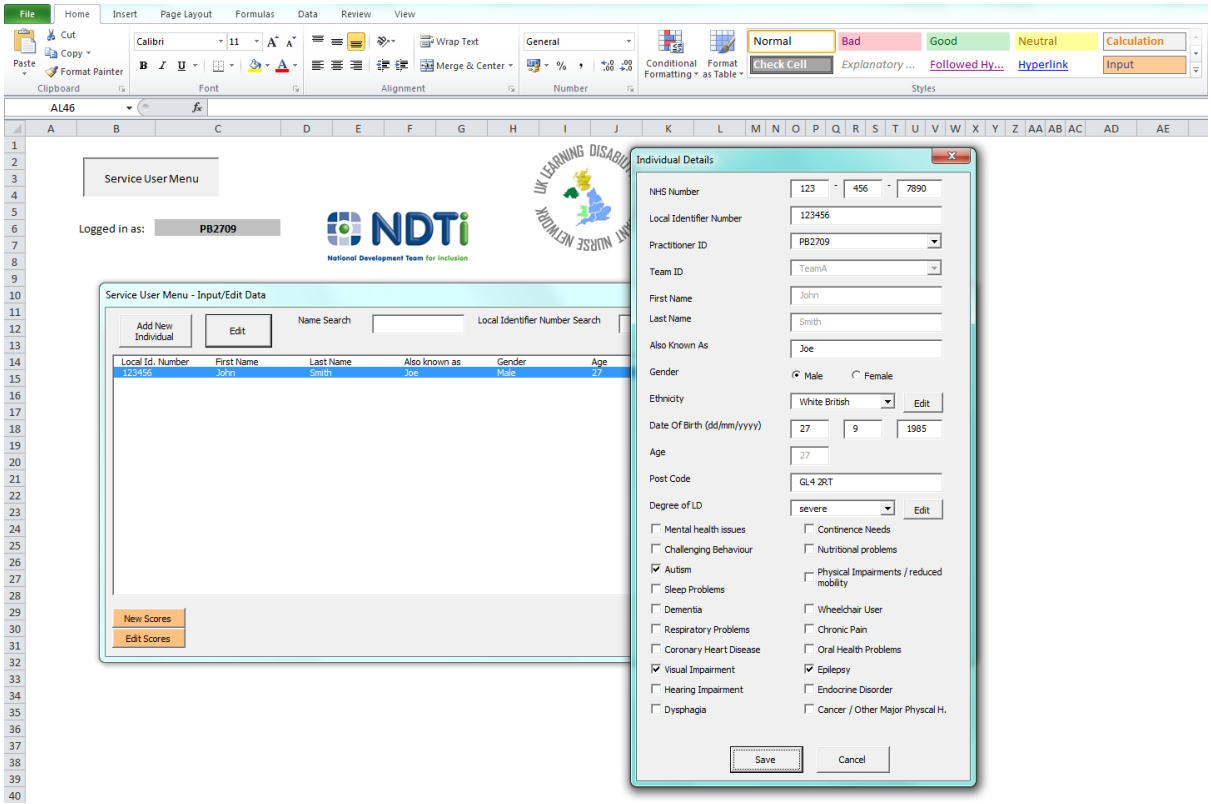

Individual Details
NHS Number
Local Identifier Number
Practitioner ID
PB2709
Team ID
TeamA
First Name
Last Name
Also Known As
Gender
Male
Female
Ethnicity
Edit
Edit List
Microsoft Excel
Enter new entry
OK
Cancel
Edit
New
Delete
Close
Sleep Problems
Dementia
Visual Impairment
Hearing Impairment
Dysphagia
Epilepsy
Endocrine Disorder
Cancer / Other Major Physcal H.
Save
Cancel


Individual Details
NHS Number
123
456
7890
Local Identifier Number
123456
Practitioner ID
PB2709
Team ID
TeamA
First Name
John
Last Name
Smith
Also Known As
Joe
Gender
Male
Female
Ethnicity
White British
Edit
Date Of Birt
1985
Age
Post Code
Degree of LD
Edit
Microsoft Excel
Are you sure you want to submit?
Yes
No
Mental H
Challenging Behaviour
Autism
Sleep Problems
Dementia
Respiratory Problems
Coronary Heart Disease
Visual Impairment
Hearing Impairment
Dysphagia
Nutritional problems
Physical Impairments / reduced mobility
Wheelchair User
Chronic Pain
Oral Health Problems
Epilepsy
Endocrine Disorder
Cancer / Other Major Physcal H.
Save
Cancel

Editing an individual's details:

1) Click Add/Edit Data
2) Select the individual whose details you wish to edit
3) Click 'Edit' and off you go..
4) Click 'Save' and confirm

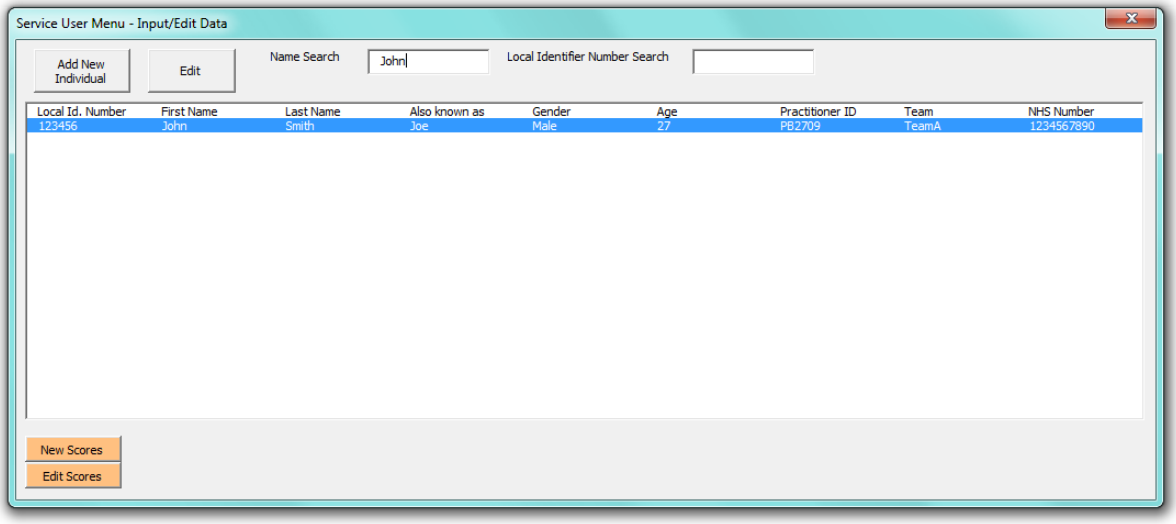
Note: you cannot edit an individual's name. This is to ensure consistency of data and prevent users from inadvertently over-writing a name.

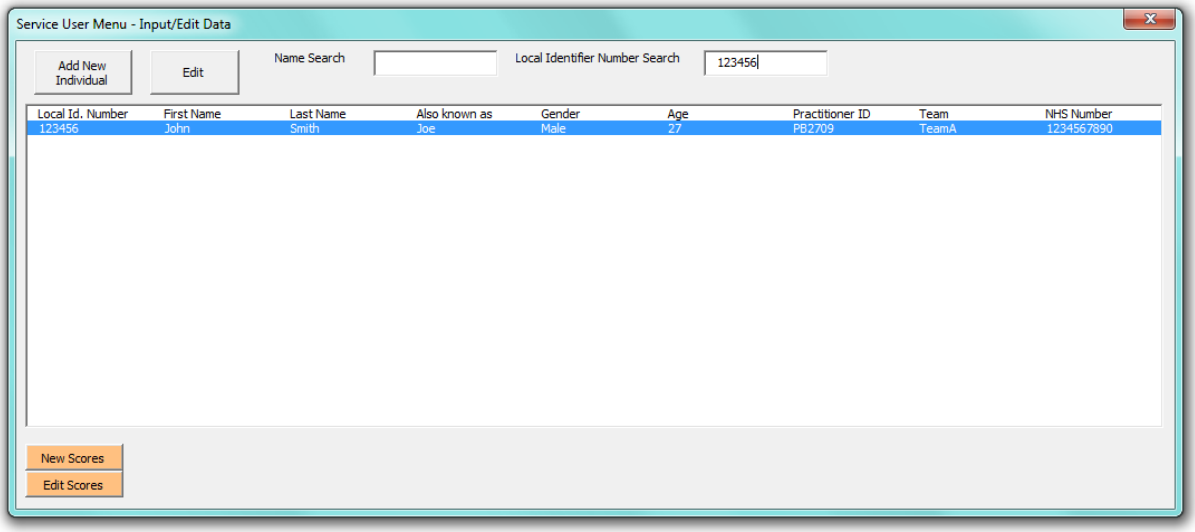


Finding an individual:

There are three ways to find an individual:

a) You can simply scroll down your list until you find the person you're looking for. This will be fine if you only have a small number of individual's records.
b) Start typing the first name in the *Name Search* box. The nearest match will then be highlighted/selected
c) Use the *Local Identifier Number Search* box in the same way as above, simply start typing the reference/number in the search box and the nearest match will be highlighted



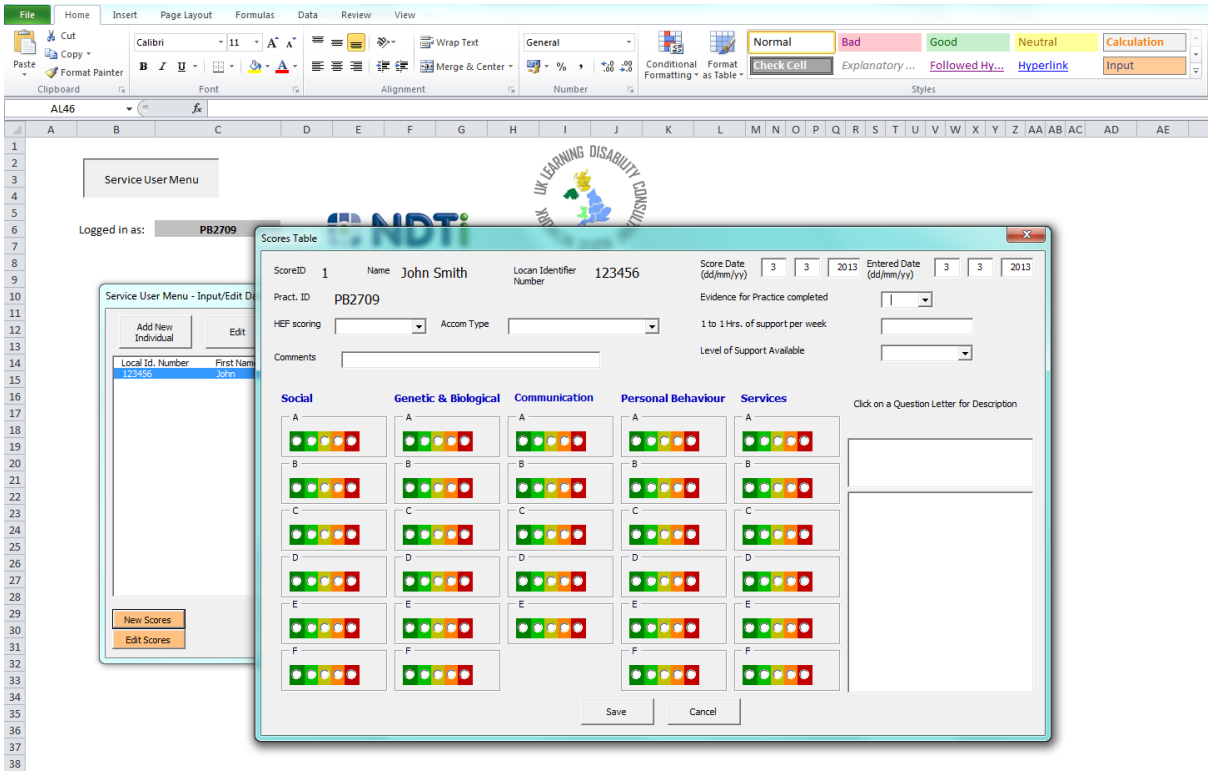


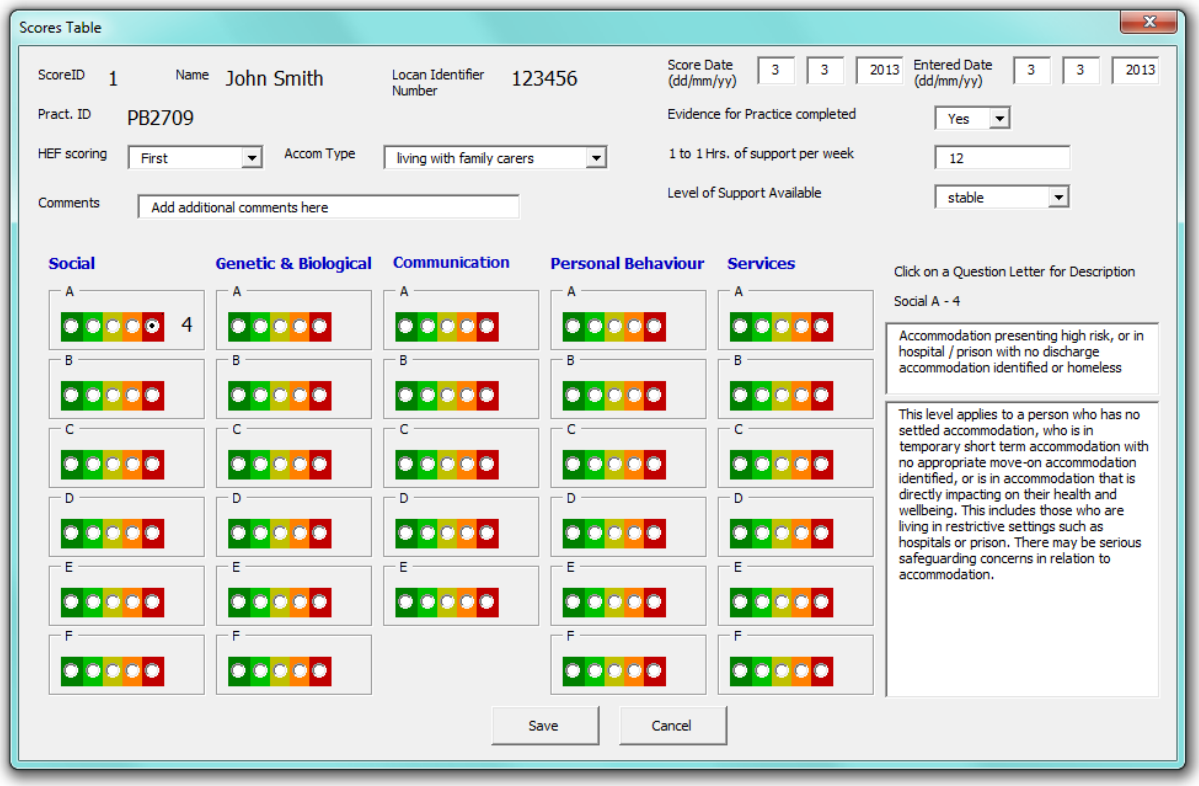
Adding a set of new scores:

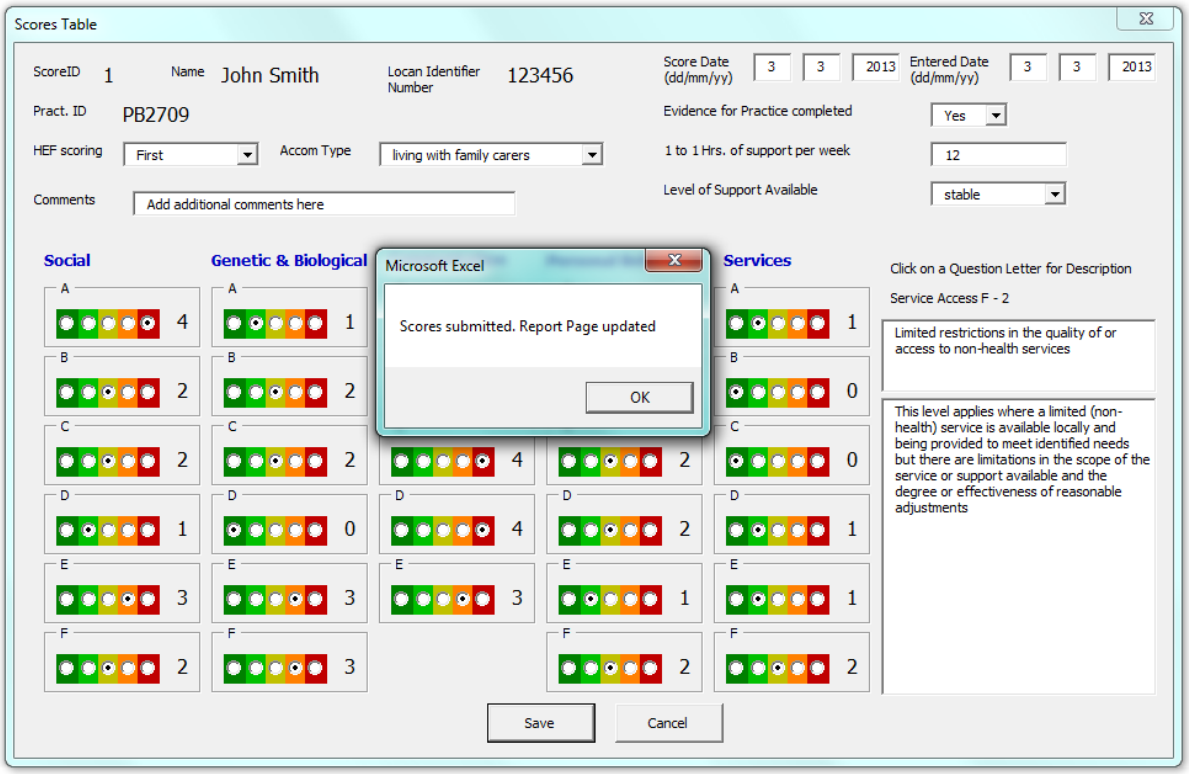
Once you've added the details of one or more individuals to eHEF you can go ahead and start recording HEF assessment information.

1) Using one of the methods described in 'Finding an Individual', locate the person for whom you wish to capture a score set
2) Click 'New Scores'
3) The scores form opens up ready for your data
4) Once you've completed all required fields click 'Save' and confirm
5) You receive a prompt letting you know that the scores have been saved and the report page updated – see the *Reports* section later in this document for details of reports.

Required fields: Everything on this form is required to be completed except *Comments* and *1 to 1 Hrs. of support*. If you miss anything out eHEF will prompt you after you click save.


Service User Menu
Logged in as:
PB2709
Scores Table
ScoreID 1
Name John Smith
Locan Identifier Number 123456
Pract. ID PB2709
Score Date (dd/mm/yy) 3 3 2013
Entered Date (dd/mm/yy) 3 3 2013
Evidence for Practice completed
HEF scoring
Accom Type
1 to 1 Hrs. of support per week
Comments
Level of Support Available
Social
Genetic & Biological
Communication
Personal Behaviour
Services
Click on a Question Letter for Description
Add New Individual
Edit
New Scores
Edit Scores
Save
Cancel


Scores Table
ScoreID 1
Name John Smith
Locan Identifier Number 123456
Score Date (dd/mm/yy) 3 3 2013
Entered Date (dd/mm/yy) 3 3 2013
Pract. ID PB2709
Evidence for Practice completed Yes
HEF scoring First
Accom Type living with family carers
1 to 1 Hrs. of support per week 12
Comments Add additional comments here
Level of Support Available stable
Social
Genetic & Biological
Communication
Personal Behaviour
Services
Click on a Question Letter for Description
Social A - 4
Accommodation presenting high risk, or in hospital / prison with no discharge accommodation identified or homeless
This level applies to a person who has no settled accommodation, who is in temporary short term accommodation with no appropriate move-on accommodation identified, or is in accommodation that is directly impacting on their health and wellbeing. This includes those who are living in restrictive settings such as hospitals or prison. There may be serious safeguarding concerns in relation to accommodation.
Save
Cancel

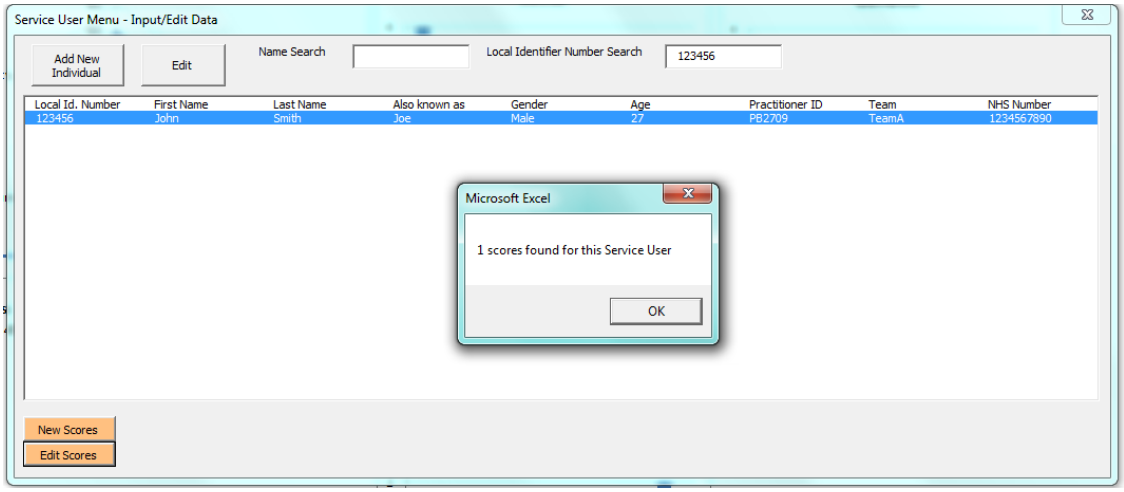

Scores Table
ScoreID 1
Name John Smith
Locan Identifier Number 123456
Score Date (dd/mm/yy) 3 3 2013
Entered Date (dd/mm/yy) 3 3 2013
Pract. ID PB2709
Evidence for Practice completed Yes
HEF scoring First
Accom Type living with family carers
1 to 1 Hrs. of support per week 12
Comments Add additional comments here
Level of Support Available stable
Social
Genetic & Biological
Services
Microsoft Excel
Scores submitted. Report Page updated
OK
Click on a Question Letter for Description
Service Access F - 2
Limited restrictions in the quality of or access to non-health services
This level applies where a limited (non-health) service is available locally and being provided to meet identified needs but there are limitations in the scope of the service or support available and the degree or effectiveness of reasonable adjustments
Save
Cancel

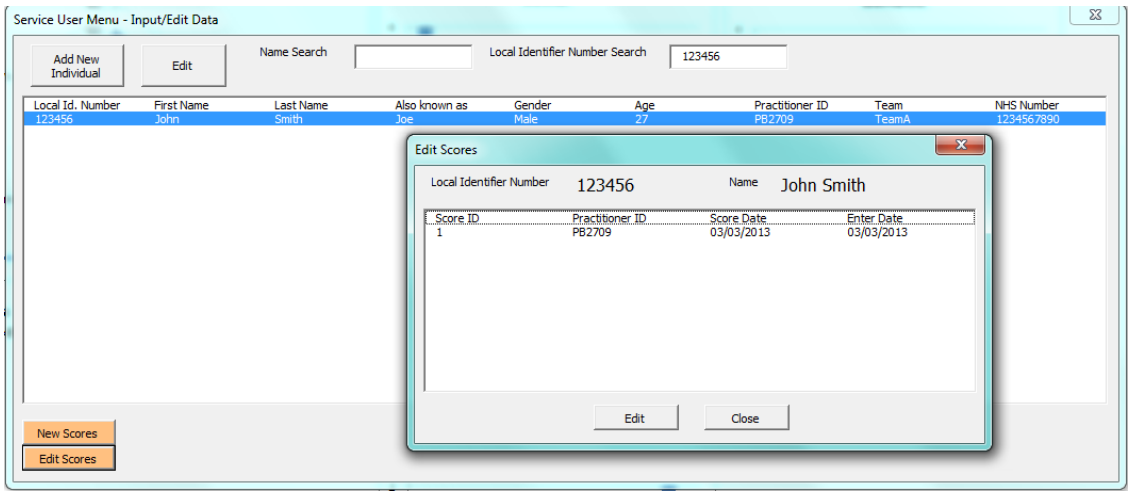
Editing a set of scores:

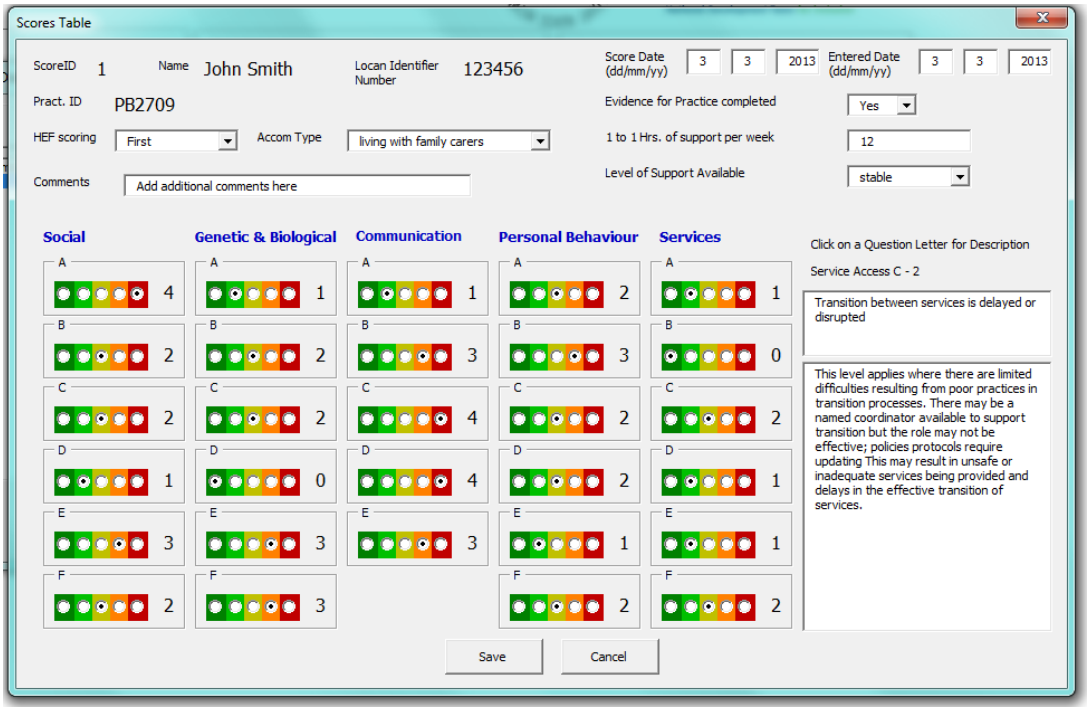
Whilst it is recommended you aim to record data accurately it is also recognised that you may occasionally have the need to make corrections or changes. So, the *Edit Scores* feature is available for this purpose. To use it:

1) Locate the individual whose scores you need to edit – see section above for a reminder of the options for searching
2) Click 'Edit Scores' – you'll then be prompted with the number of score sets for the individual
3) Click 'Ok' and in the next dialog box choose the score set you want to edit
4) The dates on which the scores were taken and logged are available to assist you find the right one
5) Select the score set you want to edit and click 'Edit'
6) Make your necessary changes and click 'Save'

Note: Remember you must complete the majority of fields in the scores form. If you leave any required fields blank eHEF will prompt you to complete them when you save.

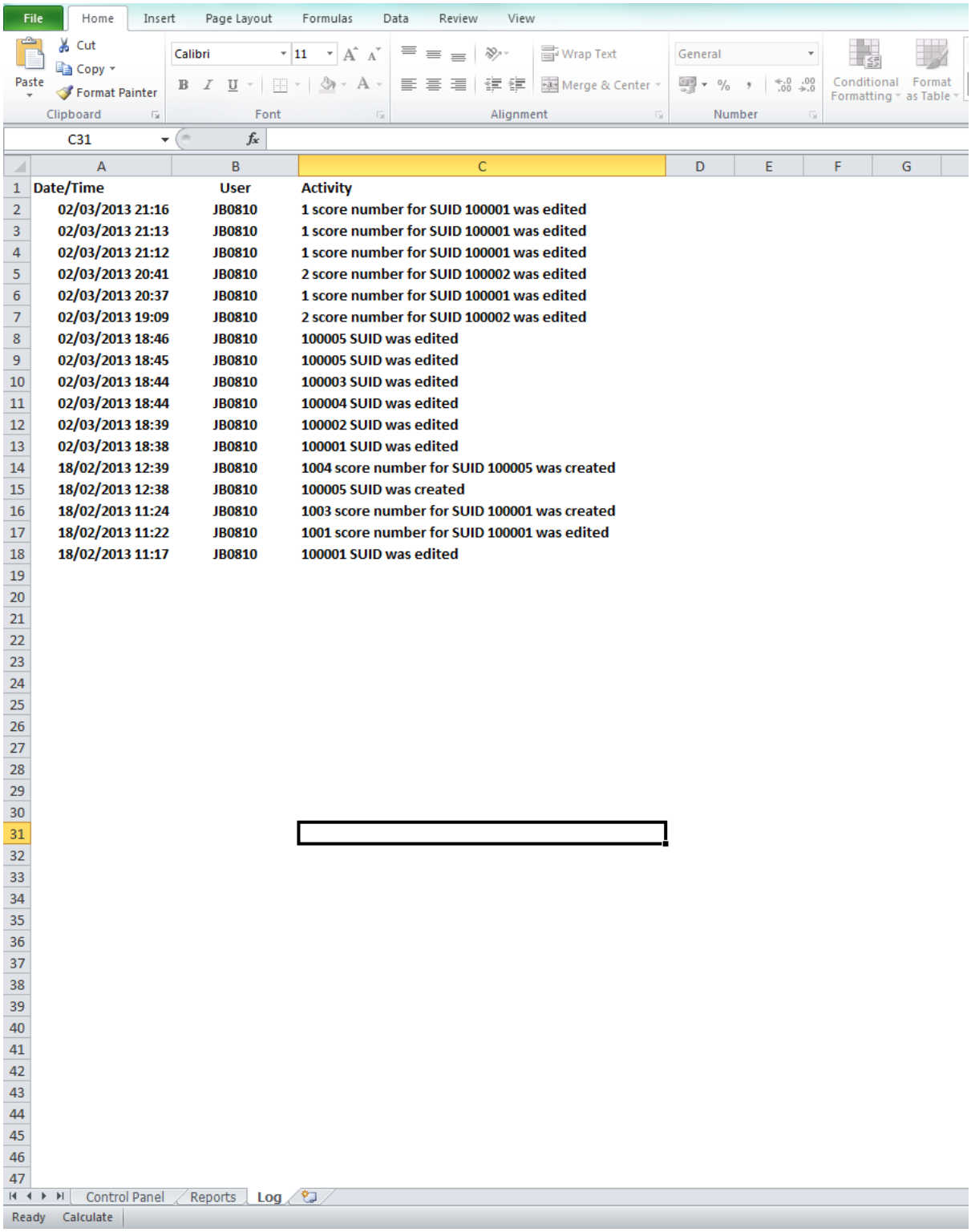

Service User Menu - Input/Edit Data
Add New Individual
Edit
Name Search
Local Identifier Number Search
123456
Local Id. Number
First Name
Last Name
Also known as
Gender
Age
Practitioner ID
Team
NHS Number
123456
John
Smith
Joe
Male
27
PB2709
TeamA
1234567890
Microsoft Excel
1 scores found for this Service User
OK
New Scores
Edit Scores


Service User Menu - Input/Edit Data
Add New Individual
Edit
Name Search
Local Identifier Number Search
123456
Local Id. Number
First Name
Last Name
Also known as
Gender
Age
Practitioner ID
Team
NHS Number
123456
John
Smith
Joe
Male
27
PB2709
TeamA
1234567890
Edit Scores
Local Identifier Number
123456
Name
John Smith
Score ID
Practitioner ID
Score Date
Enter Date
1
PB2709
03/03/2013
03/03/2013
Edit
Close
New Scores
Edit Scores


Scores Table
ScoreID
1
Name
John Smith
Locan Identifier Number
123456
Score Date (dd/mm/yy)
3
3
2013
Entered Date (dd/mm/yy)
3
3
2013
Pract. ID
PB2709
Evidence for Practice completed
Yes
HEF scoring
First
Accom Type
living with family carers
1 to 1 Hrs. of support per week
12
Comments
Add additional comments here
Level of Support Available
stable
Social
Genetic & Biological
Communication
Personal Behaviour
Services
A 4 1 1 2 1
B 2 2 3 3 0
C 2 2 4 2 2
D 1 0 4 2 1
E 3 3 3 1 1
F 2 3 2 2
Click on a Question Letter for Description
Service Access C - 2
Transition between services is delayed or disrupted
This level applies where there are limited difficulties resulting from poor practices in transition processes. There may be a named coordinator available to support transition but the role may not be effective; policies protocols require updating This may result in unsafe or inadequate services being provided and delays in the effective transition of services.
Save
Cancel

Log:

As mentioned at the beginning of the manual, there's a log feature that captures all significant activities on eHEF. Below is an illustration of the log – not very interesting but potentially very useful in some scenarios.



	A	B	C
1	Date/Time	User	Activity
2	02/03/2013 21:16	JB0810	1 score number for SUID 100001 was edited
3	02/03/2013 21:13	JB0810	1 score number for SUID 100001 was edited
4	02/03/2013 21:12	JB0810	1 score number for SUID 100001 was edited
5	02/03/2013 20:41	JB0810	2 score number for SUID 100002 was edited
6	02/03/2013 20:37	JB0810	1 score number for SUID 100001 was edited
7	02/03/2013 19:09	JB0810	2 score number for SUID 100002 was edited
8	02/03/2013 18:46	JB0810	100005 SUID was edited
9	02/03/2013 18:45	JB0810	100005 SUID was edited
10	02/03/2013 18:44	JB0810	100003 SUID was edited
11	02/03/2013 18:44	JB0810	100004 SUID was edited
12	02/03/2013 18:39	JB0810	100002 SUID was edited
13	02/03/2013 18:38	JB0810	100001 SUID was edited
14	18/02/2013 12:39	JB0810	1004 score number for SUID 100005 was created
15	18/02/2013 12:38	JB0810	100005 SUID was created
16	18/02/2013 11:24	JB0810	1003 score number for SUID 100001 was created
17	18/02/2013 11:22	JB0810	1001 score number for SUID 100001 was edited
18	18/02/2013 11:17	JB0810	100001 SUID was edited

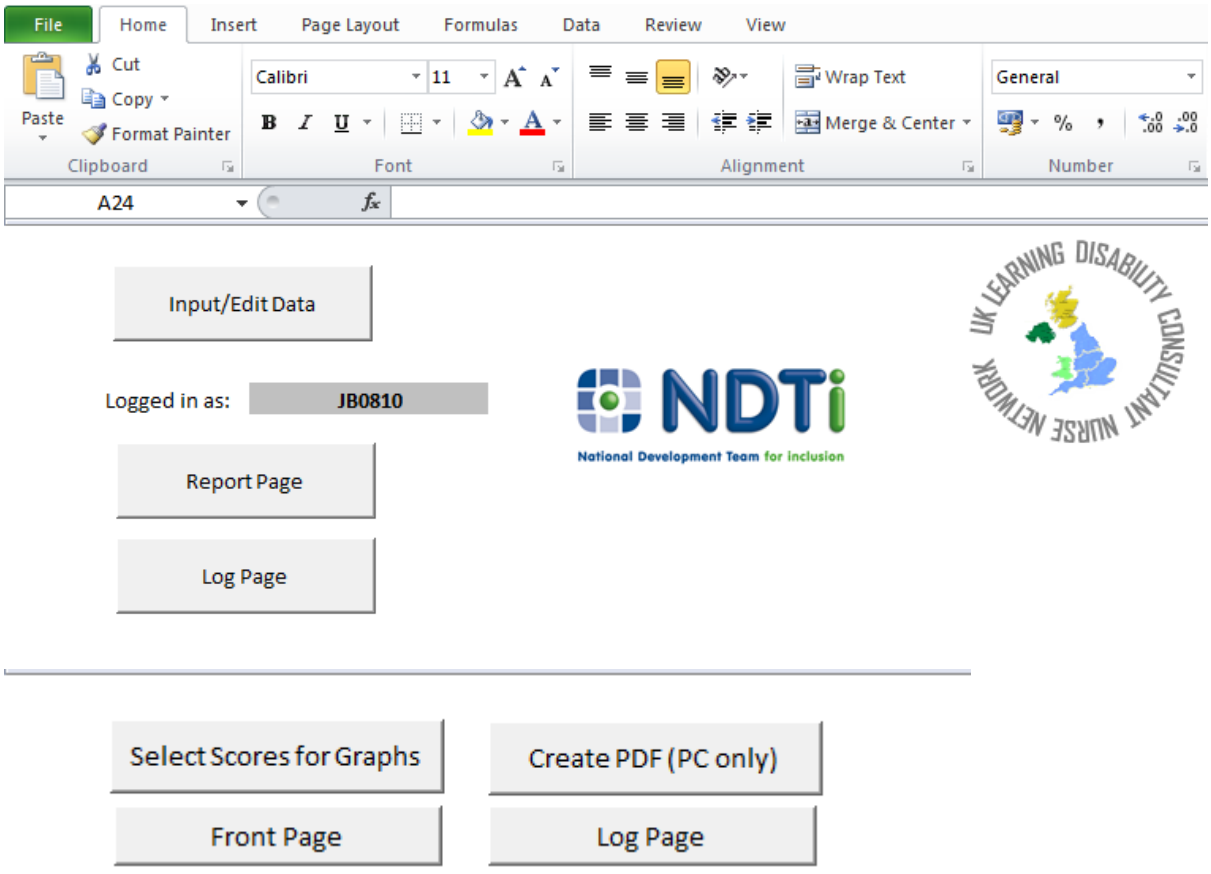
Graphing:

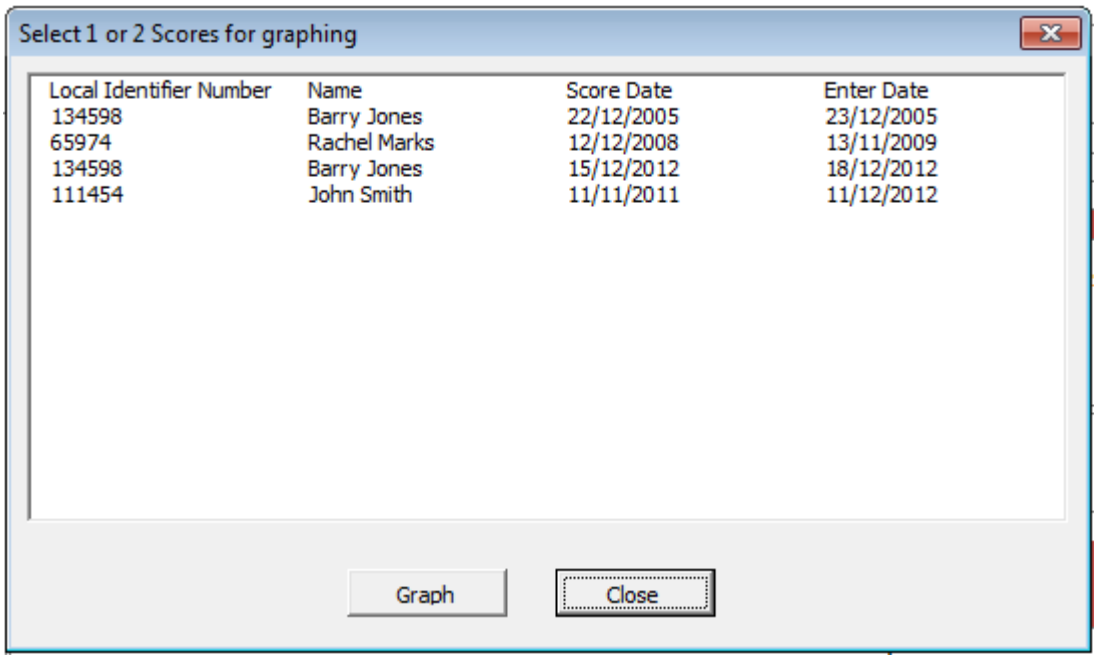
To create graphical reports of individuals, navigate your way to the Front Page and then click on 'Report Page'. This will bring you to where you can create graphs to see one or two sets of data so you can see just one current or past set of scores or choose two to compare change over time. To create graphs, do the following:

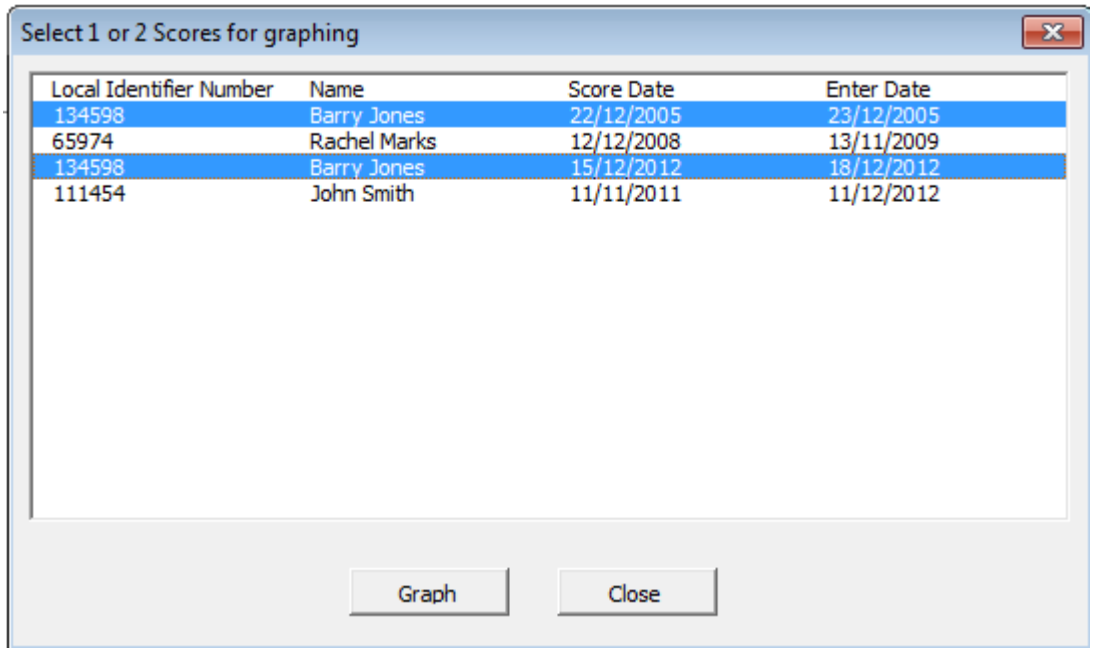
1. Click on 'Select Scores for Graphs
2. Select one or two sets of scores
3. Click Graph and then graphs displaying scores for each of the sections will be created onto the current sheet. You may need to scroll down to see all of the graphs.

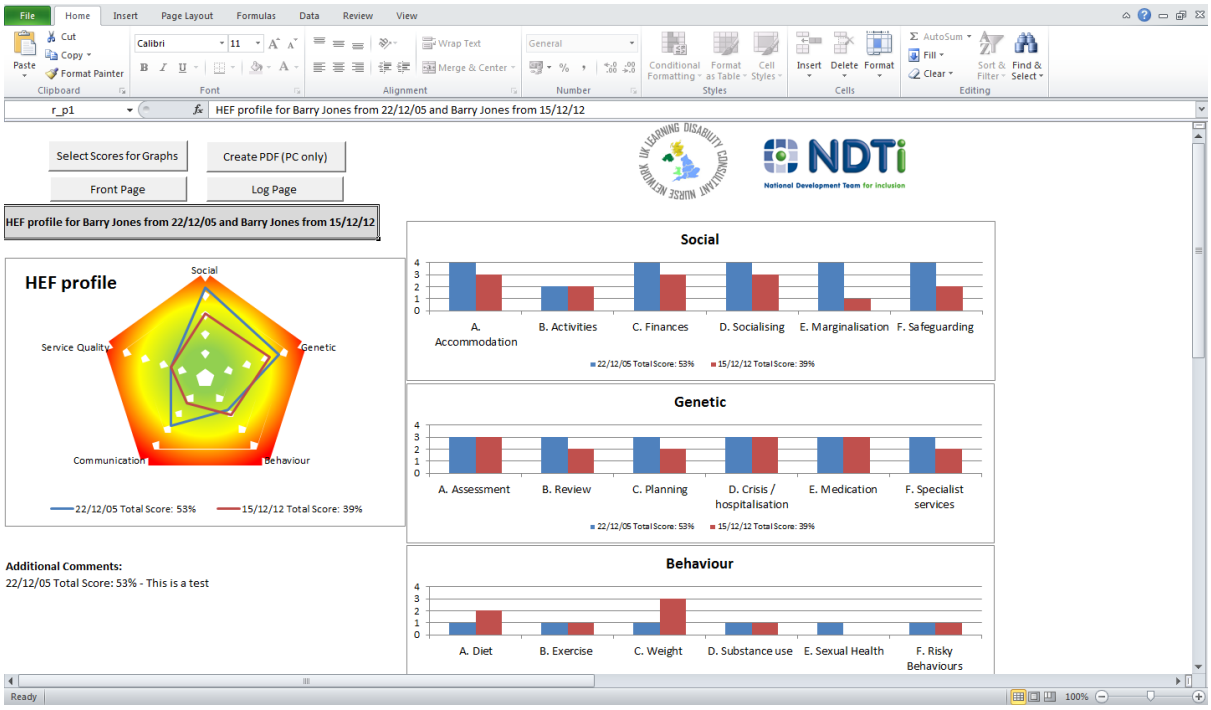
You can then create a PDF file displaying the graphs you have just created by doing the following:

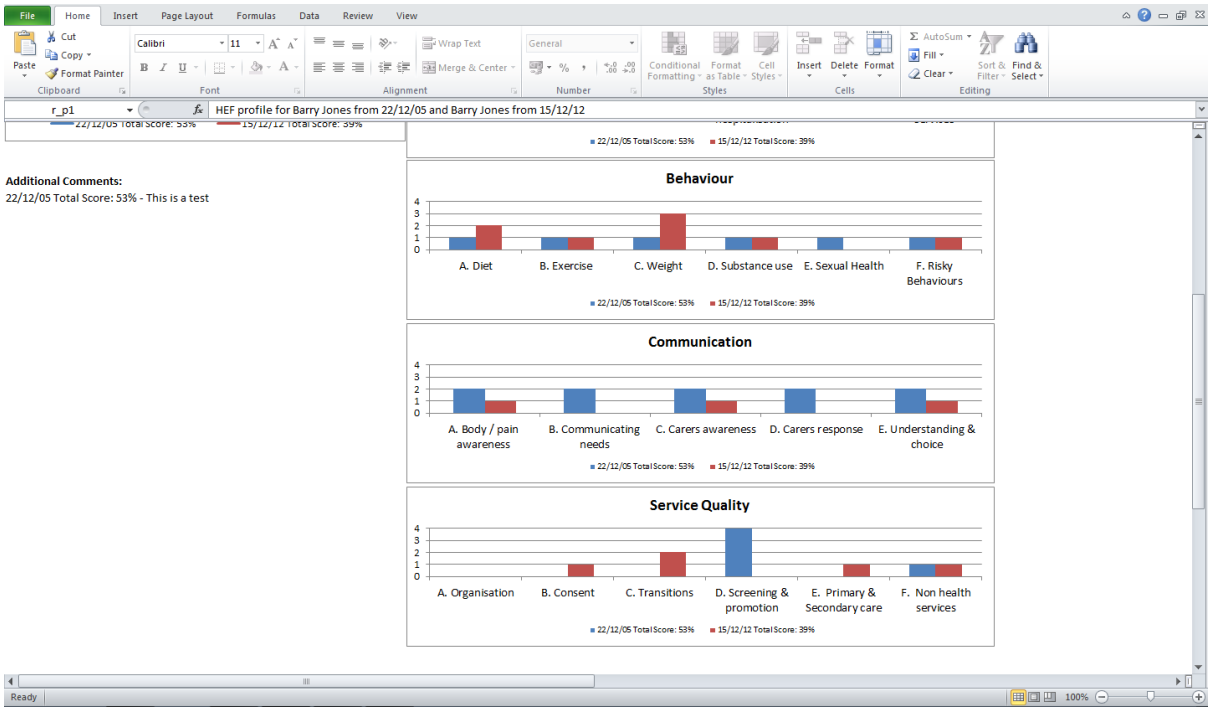
1. Click Create PDF (PC only) on the Report Page
2. Name the file appropriately
3. Find an appropriate place to save the PDF file
4. Click OK and then it will create the file and save it where you specified

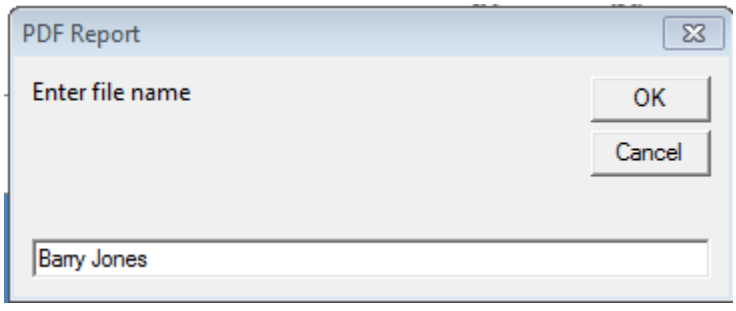


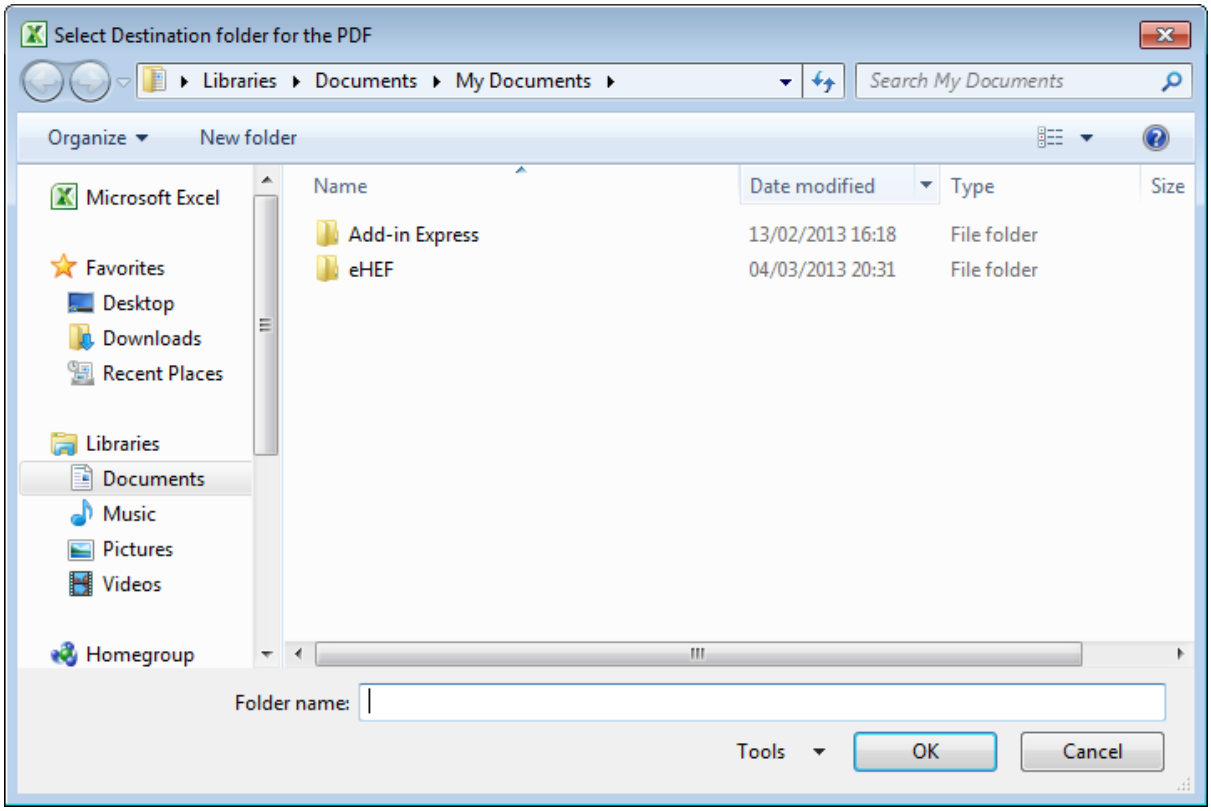

Select 1 or 2 Scores for graphing
Local Identifier Number
Name
Score Date
Enter Date
134598
Barry Jones
22/12/2005
23/12/2005
65974
Rachel Marks
12/12/2008
13/11/2009
134598
Barry Jones
15/12/2012
18/12/2012
111454
John Smith
11/11/2011
11/12/2012
Graph
Close

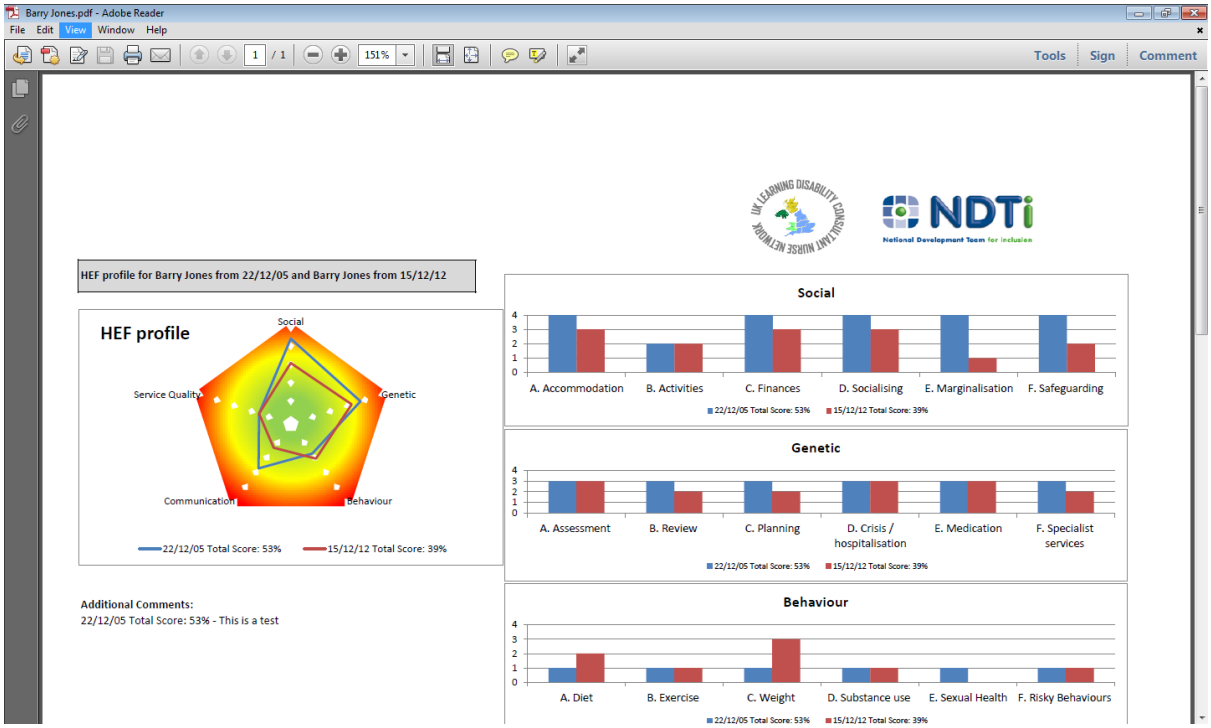

Select 1 or 2 Scores for graphing
Local Identifier Number
Name
Score Date
Enter Date
134598
Barry Jones
22/12/2005
23/12/2005
65974
Rachel Marks
12/12/2008
13/11/2009
134598
Barry Jones
15/12/2012
18/12/2012
111454
John Smith
11/11/2011
11/12/2012
Graph
Close


File
Home
Insert
Page Layout
Formulas
Data
Review
View
r_p1
HEF profile for Barry Jones from 22/12/05 and Barry Jones from 15/12/12
Select Scores for Graphs
Create PDF (PC only)
Front Page
Log Page
HEF profile for Barry Jones from 22/12/05 and Barry Jones from 15/12/12
HEF profile
Social
Genetic
Behaviour
Communication
Service Quality
22/12/05 Total Score: 53%
15/12/12 Total Score: 39%
Additional Comments:
22/12/05 Total Score: 53% - This is a test
Social
A. Accommodation
B. Activities
C. Finances
D. Socialising
E. Marginalisation
F. Safeguarding
Genetic
A. Assessment
B. Review
C. Planning
D. Crisis / hospitalisation
E. Medication
F. Specialist services
Behaviour
A. Diet
B. Exercise
C. Weight
D. Substance use
E. Sexual Health
F. Risky Behaviours
Ready


File
Home
Insert
Page Layout
Formulas
Data
Review
View
r_p1
HEF profile for Barry Jones from 22/12/05 and Barry Jones from 15/12/12
Additional Comments:
22/12/05 Total Score: 53% - This is a test
Behaviour
A. Diet
B. Exercise
C. Weight
D. Substance use
E. Sexual Health
F. Risky Behaviours
Communication
A. Body / pain awareness
B. Communicating needs
C. Carers awareness
D. Carers response
E. Understanding & choice
Service Quality
A. Organisation
B. Consent
C. Transitions
D. Screening & promotion
E. Primary & Secondary care
F. Non health services
Ready


PDF Report
Enter file name
OK
Cancel
Barry Jones


Select Destination folder for the PDF
Libraries ▸ Documents ▸ My Documents ▸
Search My Documents
Organize
New folder
Microsoft Excel
Favorites
Desktop
Downloads
Recent Places
Libraries
Documents
Music
Pictures
Videos
Homegroup
Name
Date modified
Type
Size
Add-in Express
13/02/2013 16:18
File folder
eHEF
04/03/2013 20:31
File folder
Folder name:
Tools
OK
Cancel


Barry Jones.pdf - Adobe Reader
File Edit View Window Help
Tools
Sign
Comment
HEF profile for Barry Jones from 22/12/05 and Barry Jones from 15/12/12
HEF profile
Social
Genetic
Behaviour
Communication
Service Quality
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A. Assessment
B. Review
C. Planning
D. Crisis / hospitalisation
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F. Specialist services
Behaviour
A. Diet
B. Exercise
C. Weight
D. Substance use
E. Sexual Health
F. Risky Behaviours